
I Want to Set up Stored or Shared Bank Account Information

Slide notes

The California Employment Development Department (EDD) developed this tutorial to assist you with navigating through e-Services for Business.

This tutorial will show you how to set up stored bank account information for individual accounts and how to set up a shared payment source for all your enrolled accounts in e-Services for Business.

e-Services for Business X

https://eddservices.edd.ca.gov

CA.gov State of California Employment Development Department

My Profile

e-Services FAQs e-Services Tutorials Contact Payroll Taxes Employer Services Online

My Accounts Log Out

My Accounts Other Accounts

My Profile

XXXX-XXXXXX
SMALL BUSINESS
456 ANY ST
SACRAMENTO CA 95814-0000

ALERTS

There are no alerts

I WANT TO

Register a New Account (DE 1)
Add Access to Another Account
Attach a Bulk Payment File
Attach a Return File
Make Multiple Payments

SUMMARY RECENT ITEMS NAMES AND ADDRESSES

MY ACCOUNTS

Filter

Account Type	Account ID	Name	Balance
Employment Tax	XXX-XXXX-X	SMALL BUSINESS	0.00

Employer: Select the Account Type (e.g., Employment Tax) to file a return, make a payment, update account information, or for other options.

Agent/Employer Representative: Select Other Accounts from the top-right, then select the Account Type (e.g., Employment Tax) to file a return, make a payment, update account information, or for other options.

Slide notes

We will begin at the e-Services for Business home page. Select the "Employment Tax" link.

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My Accounts » Account: XXX-XXXX

Select "Settings"

EMPLOYMENT TAX
XXX-XXXX-X
SMALL BUSINESS
456 ANY ST
SACRAMENTO CA 95814-0000

Settings

ACCOUNT ALERTS
✓ There are no alerts

I WANT TO
More...
Make a Payment
View My Payments
Update Account
Close Account
Get My UI Rate

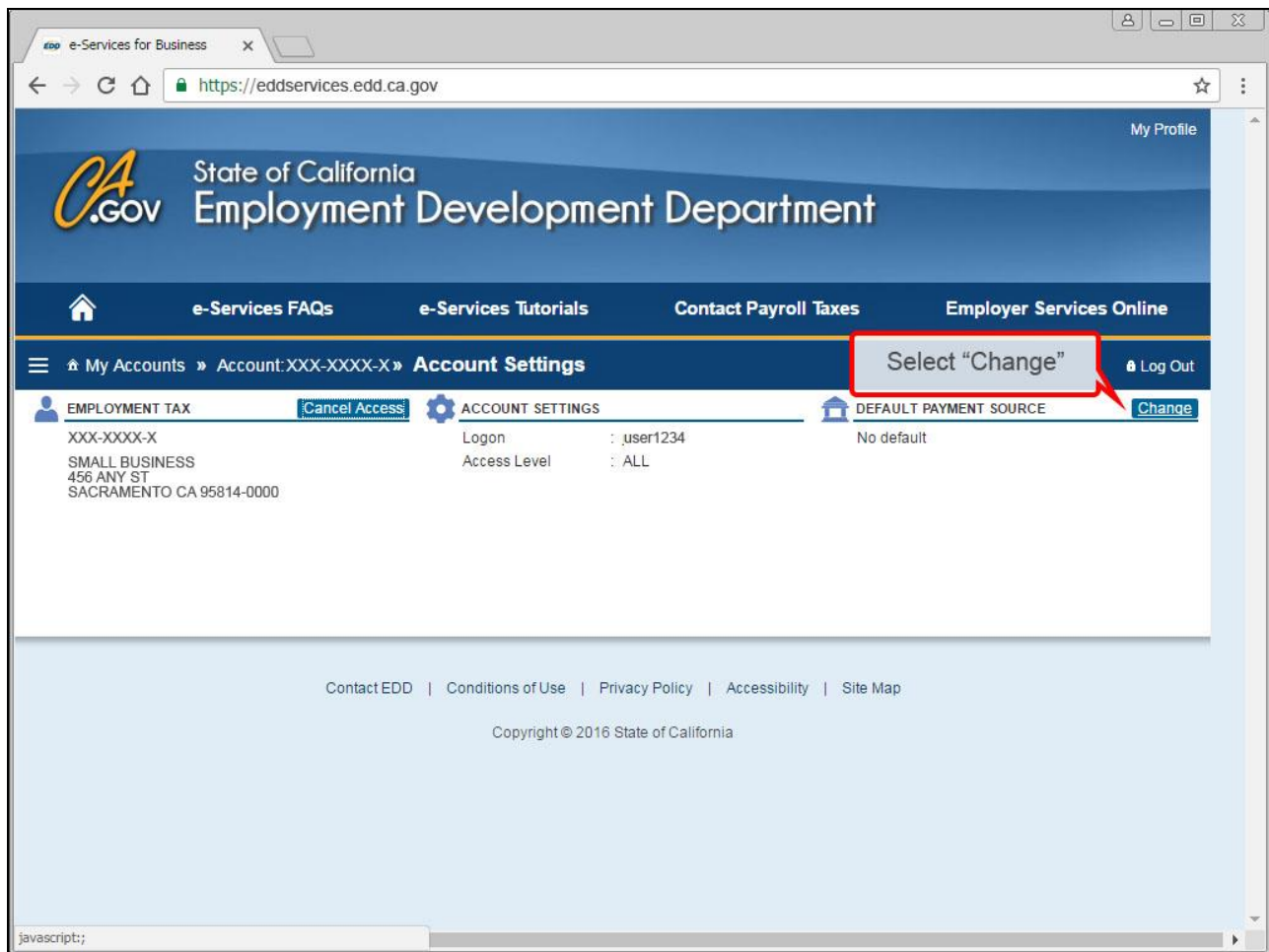
LAST 12 PERIODS ALL PERIODS RECENT ITEMS NAMES AND ADDRESSES LOGONS

LAST 12 PERIODS

Period	Balance	Last Activity		
31-Mar-2017	0.00			
31-Dec-2016	0.00			
30-Sep-2016	0.00			
30-Jun-2016	0.00	01-Jul-2016	Processed	Tax Return
31-Mar-2016	0.00	02-Aug-2016	Processed	Wage Report
31-Dec-2015	0.00	04-Jan-2016	Processed	Tax Return
30-Sep-2015	0.00	01-Oct-2015	Processed	Wage Report
30-Jun-2015	0.00	16-Jul-2015	Processed	Wage Report
31-Mar-2015	0.00	22-Apr-2015	Processed	Wage Report

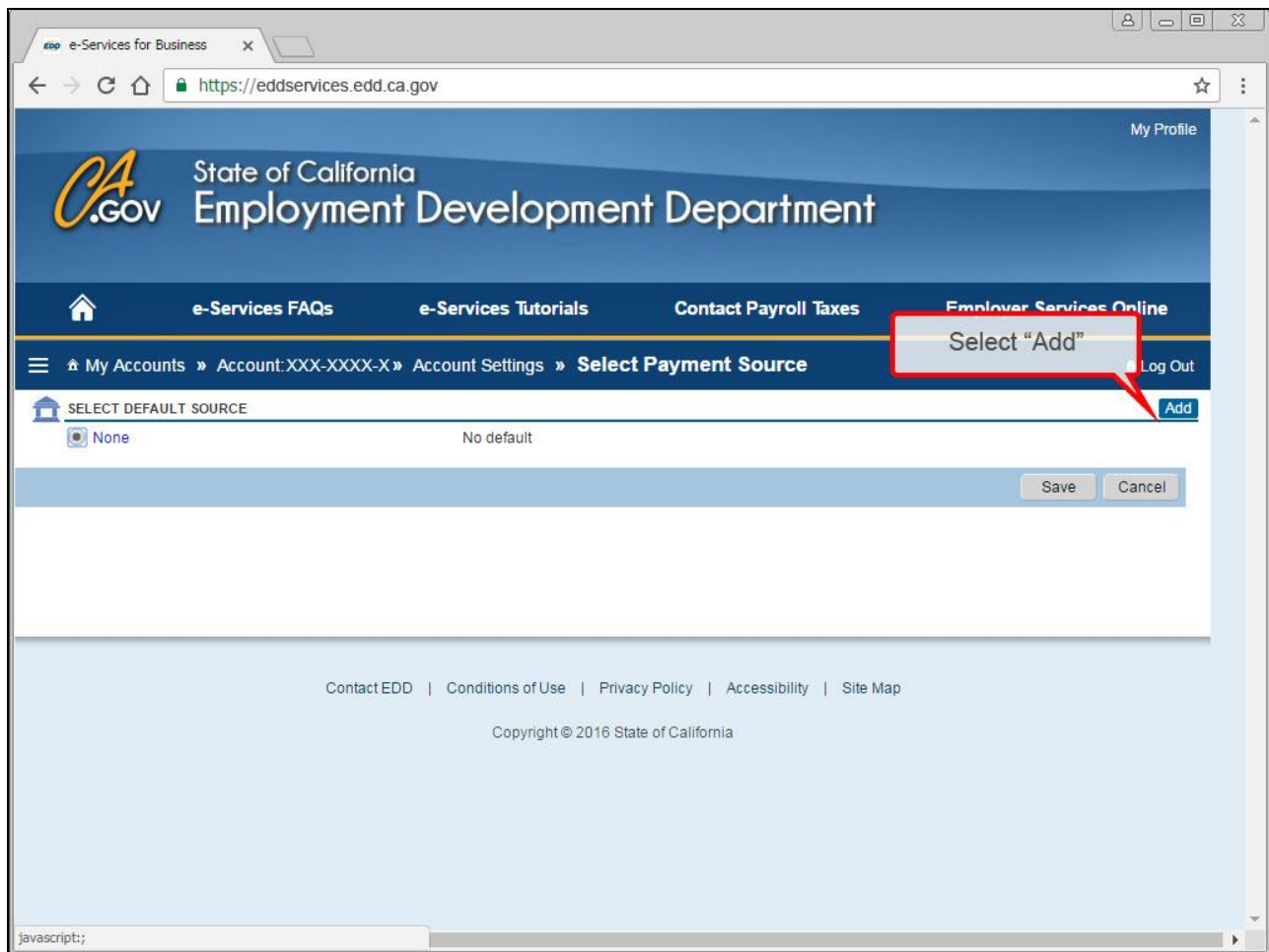
Slide notes

Select the "Settings" link.



Slide notes

Select the “Change” link next to “DEFAULT PAYMENT SOURCE.”



Slide notes

Select the "Add" link.

e-Services for Business X

https://eddservices.edd.ca.gov

My Profile

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e-Services FAQs e-Services Tutorials Contact Payroll Taxes Employer Services Online

My Accounts » Account: XXX-XXXX-X » Account Settings » **Select Payment Source** Log Out

BANK ACCOUNT

Bank Account Type Required

Checking

Savings

Account Number Required

Confirm Account Number Required

Use default name

No Yes

Name

Save Cancel

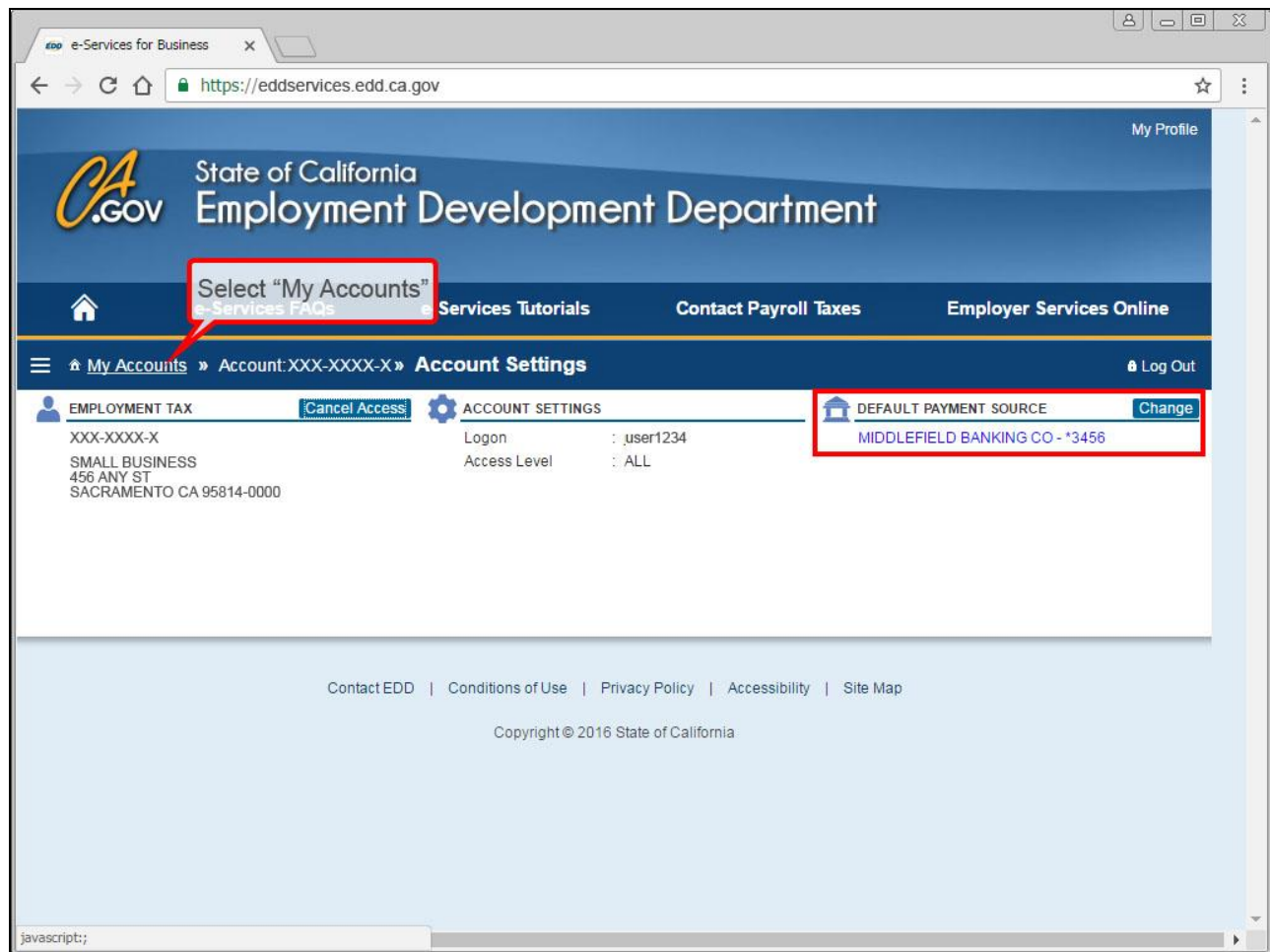
Slide notes

Select either checking or savings from the “Bank Account Type” drop down menu. For this example, we selected checking.

The screenshot shows a web browser window with the URL <https://eddservices.edd.ca.gov>. The page header includes the CA.gov logo and the text "State of California Employment Development Department". A navigation bar contains links for "e-Services FAQs", "e-Services Tutorials", "Contact Payroll Taxes", and "Employer Services Online". Below this, a breadcrumb trail reads "My Accounts » Account: XXX-XXXX-X » Account Settings » Select Payment Source". The main content area is titled "BANK ACCOUNT" and contains the following fields: "Bank Account Type" (a dropdown menu set to "Checking"), "Routing Number", "Bank Name", "Account Number", and "Confirm Account Number". Below these fields is a "Use default name" section with two tabs: "No" and "Yes" (which is selected). Under the "Yes" tab, the "Name" field displays "MIDDLEFIELD BANKING CO - *3456". At the bottom right of the form are "Save" and "Cancel" buttons. A red box highlights the "Use default name" section, and another red box with an arrow points to the "Save" button with the text "Select 'Save'".

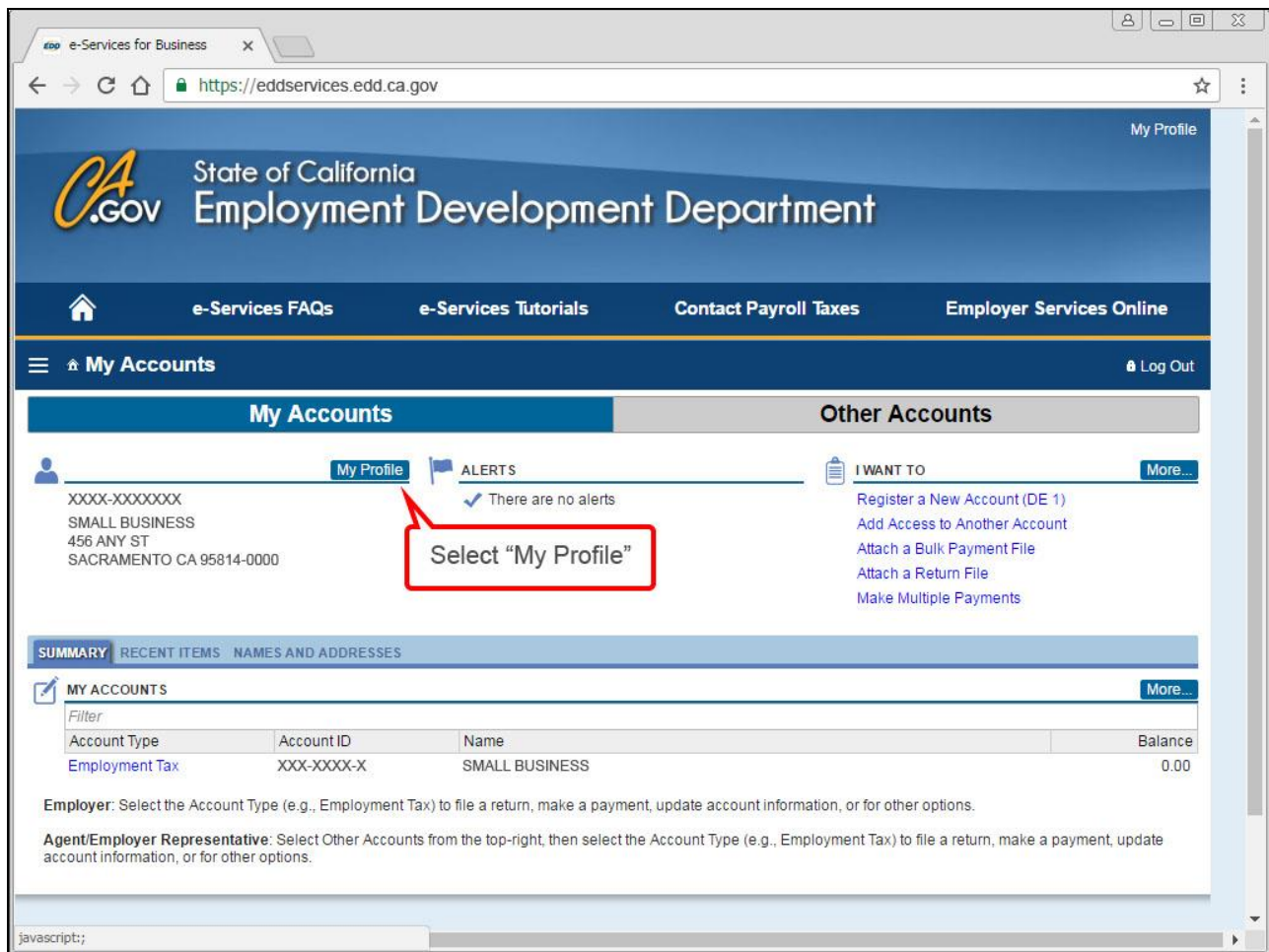
Slide notes

Enter the correct routing number, account number, and then re-enter the account number in the "Confirm the Account Number" field. If you would like to use a different name from the default name, select the "No" tab and enter a name you choose. When completed, select "Save."



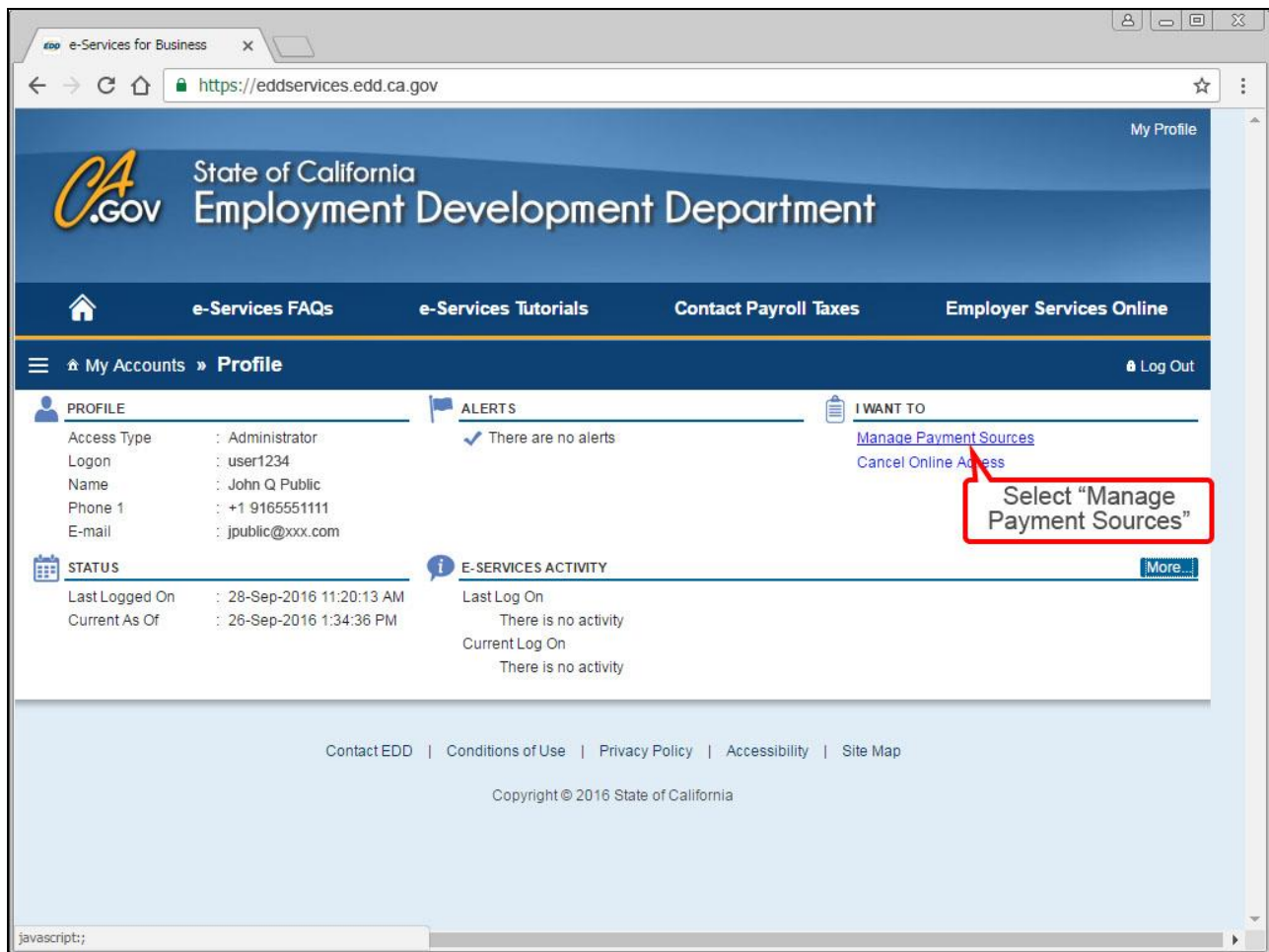
Slide notes

This stored payment information will now be the default payment source for all payments made for this account in e-Services for Business. You still have the option to manually enter payment information if you choose. Select “My Accounts” to return to the e-Services for Business home page.



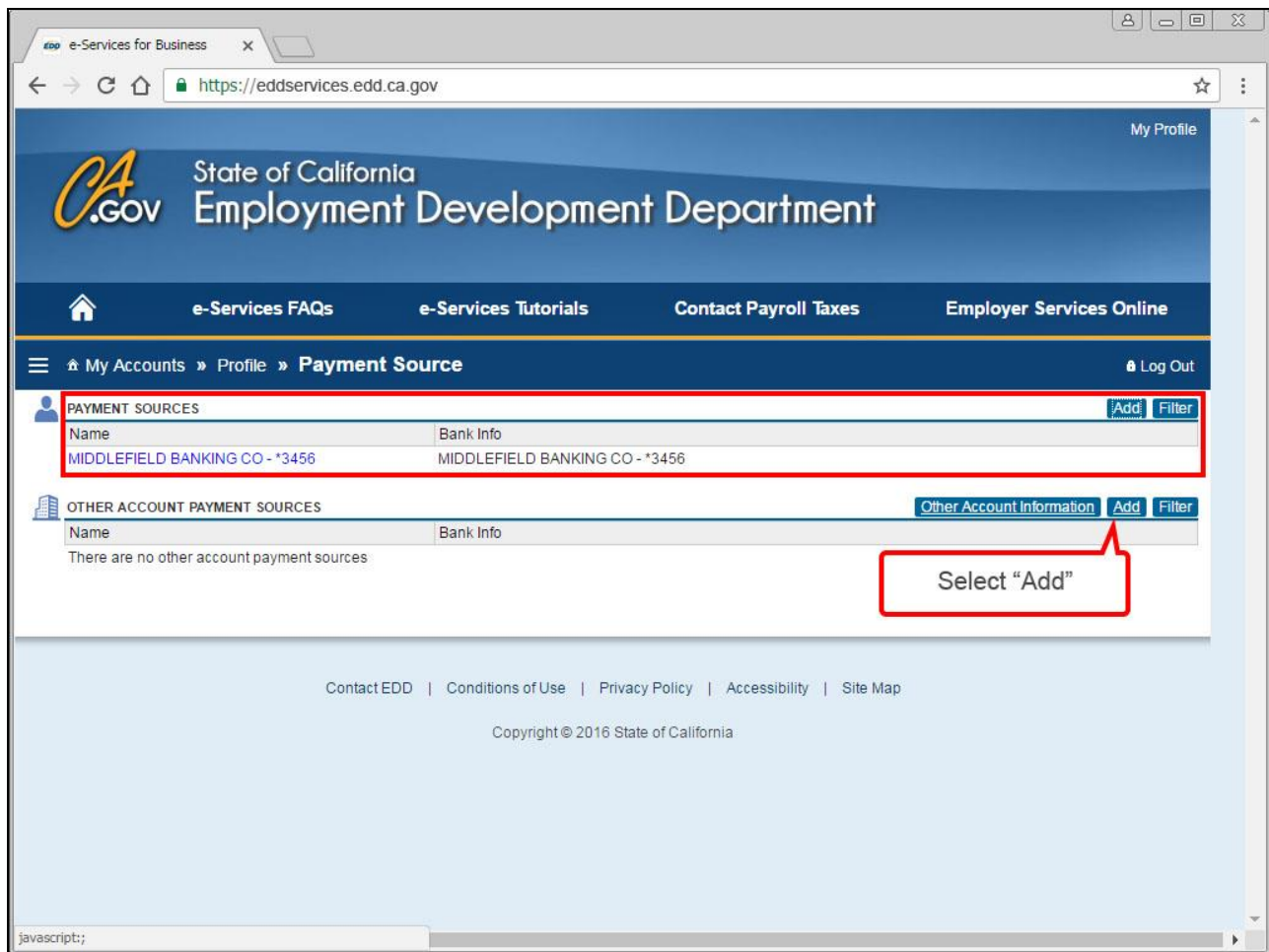
Slide notes

To set up a shared payment source that can be used for all other accounts in e-Services for Business, select the "My Profile" link in the "Summary" section.



Slide notes

Select the "Manage Payment Sources" link under the "I WANT TO" menu.



Slide notes

Here we can see the individual payment source we just added. Select the “Add” link next to the “OTHER ACCOUNT PAYMENT SOURCES” section to add a payment source.

e-Services for Business X

https://eddservices.edd.ca.gov

My Profile

CA.gov State of California Employment Development Department

e-Services FAQs e-Services Tutorials Contact Payroll Taxes Employer Services Online

My Accounts » Account: XXX-XXXX-X » Account Settings » **Select Payment Source** Log Out

BANK ACCOUNT

Bank Account Type Required

Checking

Savings

Account Number Required

Confirm Account Number Required

Use default name

No Yes

Name

Save Cancel

Slide notes

Select either checking or savings from the “Bank Account Type” drop down menu. For this example, we selected checking.

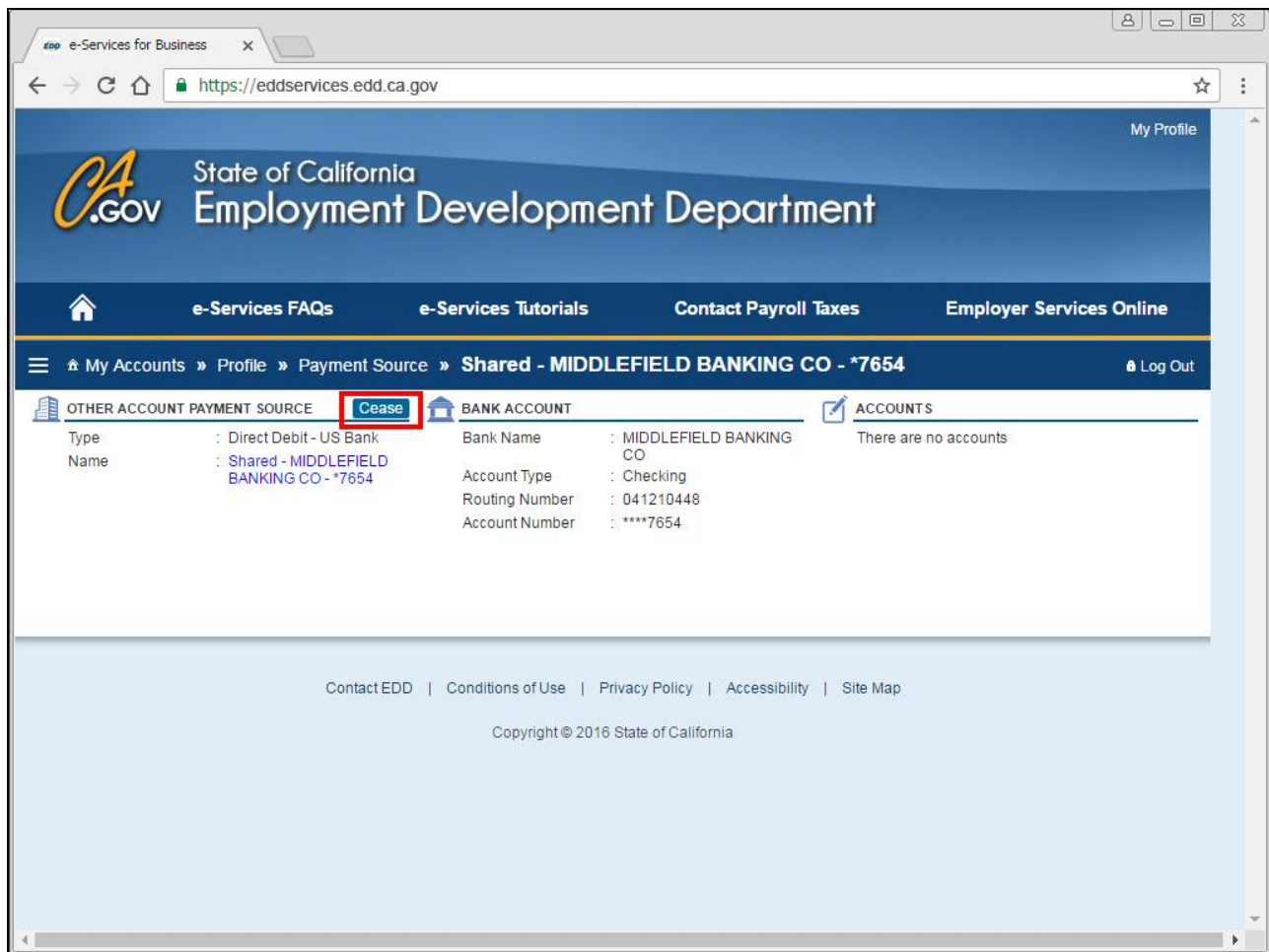
The screenshot shows the EDD e-Services for Business portal. The header includes the CA.gov logo and the State of California Employment Development Department. The navigation bar contains links for e-Services FAQs, e-Services Tutorials, Contact Payroll Taxes, and Employer Services Online. The breadcrumb trail indicates the user is in the 'Select Payment Source' section. The 'BANK ACCOUNT' section contains the following fields:

- Bank Account Type: Checking
- Routing Number: [Empty]
- Bank Name: [Empty]
- Account Number: [Empty]
- Confirm Account Number: [Empty]

The 'Use default name' section has two tabs: 'No' and 'Yes'. The 'Yes' tab is selected, and the name 'MIDDLEFIELD BANKING CO - *3456' is displayed. A red box highlights this section. Another red box points to the 'Save' button at the bottom right.

Slide notes

Enter the correct routing number, account number, and then re-enter the account number in the "Confirm the Account Number" field. If you would like to use a different name from the default name, select the "No" tab and enter a name you choose. When completed, select "Save."



Slide notes

This payment source will now be available for use on all other enrolled accounts. If, at any time, you would like to stop using this shared payment source, return to this page and select the "Cease" link in the "OTHER ACCOUNT PAYMENT SOURCE" section.



Other Resources
www.edd.ca.gov

Taxpayer Assistance Center
1-888-745-3886

Slide notes

Thank you for taking the time to watch this tutorial on how to store individual and shared payment information on e-Services for Business.

Be sure to view our other tutorials demonstrating how to file a return, make a payment, and the many other actions available in e-Services for Business.

Other resources are available at www.edd.ca.gov or by calling the Taxpayer Assistance Center at 1-888-745-3886.